

STATE OF WISCONSIN, CIRCUIT COURT, _____ COUNTY

For Official Use

IN THE MATTER OF THE ESTATE OF

**Summary Assignment -
Findings and Order**

☐ with Order Appointing Special
Administrator

Case No. _____

A petition for summary assignment having been filed,

THE COURT FINDS THAT:

1. The decedent, whose date of birth was _____, and date of death was _____, died domiciled in _____ County, State of _____, with a post office address of: _____.
2. Petitioner is interested as _____.
3. Notice: ☐ has been given as required by the court ☐ has been waived ☐ was not required.
4. The first publication for creditors was made on (date) _____ and more than 30 days have elapsed since that date
5. Notice has been given to the Department of Health and Family Services and more than 30 days have elapsed since that notice was given.
6. The estate is one properly settled under summary assignment in that: *(Select either a or b below.)*
 - ☐ a. the estate was started under formal administration or summary settlement and meets the requirements of summary assignment.
 - ☐ b. the estate, less the amount of the debts for which any property in the estate is security, does not exceed \$50,000 (date of death after May 8, 2000) or \$30,000 (date of death before May 9, 2000) in value and cannot be summarily settled under §867.01, Wisconsin Statutes.
7. The decedent:
 - ☐ a. left a will which has been filed with the petition and proof of the will has been given.
 - ☐ b. died leaving no will.
8. A detailed statement of property in which the decedent had an interest is as follows: ☐ See attached.

Description of Property	Value of Decedent's Interest at Date of Death
A. <u>Property in which decedent had an interest:</u>	
B. <u>Property over which decedent had a power of appointment:</u>	
C. <u>Benefits payable on decedent's death under annuities/retirement plan/life insurance:</u>	
D. <u>Joint and life tenancies:</u>	
E. <u>Gifts made in contemplation of death or taking effect upon death or made within 2 years prior to death:</u>	
F. <u>Any other property that may be subject to death taxes as the result of the decedent's death:</u>	

9. The estate is appropriate to be settled under §867.02, Wis. Stats.

☐ a. The priority claims against the estate under §859.25, Wisconsin Statutes are:

Creditors Entitled to Payment	Amount
(1) <u>Costs and expenses of administration:</u>	
(2) <u>Funeral and burial expenses:</u>	
(3) <u>Provisions for the family of the decedent under §§861.31, 861.33 and 861.35, Wis. Stats.:</u>	
(4) <u>Other priority claims under §859.25, Wis. Stats.:</u>	

☐ b. Persons entitled to be assigned property are:

Person(s) Entitled to Assignment	Interest to be Assigned

10. Any interest of the decedent as joint tenant terminated at death.

11. Any life estate of the decedent terminated at death.

12. Any interest of the decedent in survivorship marital property vested in the surviving spouse at death.

☐ 13. It is necessary to appoint a special administrator with the following powers:

THE COURT ORDERS THAT:

1. The property is assigned to the persons entitled to it as stated below.
2. Any person indebted to or holding money or other property of the decedent pay the indebtedness or deliver the property to the persons found to be entitled to receive it as stated below.
3. Interests in real estate, stocks or bonds registered in the name of the decedent, the title of licensed motor vehicle, or any other form of property are transferred as stated below.

Person(s) Entitled to Receive	Description of Property	Value

4. If the decedent immediately prior to death had an estate for life or an interest as a joint tenant or in survivorship marital property, in any property for which a certificate of termination has not been issued, the court certifies that such interests terminated or vested at death.
- ☐ 5. The estate commenced under Chapter 856 is terminated; the personal representative is discharged and any bond is cancelled.
6. The petitioner shall mail or deliver a copy of this order to all persons interested in the estate whose post office address is known to the petitioner or can be ascertained with reasonable diligence.
- ☐ 7. Letters of Special Administration are issued to _____ upon filing a _____ bond of \$_____, with the following powers:

Name of Attorney
Address
Telephone Number

BY THE COURT:

Court Official

Name Printed or Typed

Date